



Presented to:  
The United States  
International Trade Commission

# Welcome to the EDIS

## General User Training





# Training Objectives

At the end of training, you will be able to perform the following functions:

- Register as an EDIS user
- Submit paper and electronics documents to USITC
- Search for documents in a quick and efficient manner



## What does EDIS stand for?

- Electronic Document Information System
- Users can submit paper or electronic documents
- Users can search for documents using simple or complex retrieval methods
- Documents can be retrieved, viewed and printed



# What documents are in EDIS?

**EDIS houses electronic images of documents pertaining to an investigation**

- **Investigative Materials**
  - Complaints
  - Motions
  - Pre-hearing Briefs
  
- **Non-Investigative Materials**
  - Action Request
  - News Release
  - Publication
  - Request Letter
  - Staff Report





# Getting Help

- EDIS Online Help
- Quick Start Guide
- EDIS User's Guide
- Field help – float over text
- Call the EDIS Helpdesk at 202-205-EDIS (3347)





# EDIS General Users

## ■ Registered Users

- View Public, Confidential, and Privileged Documents
  - Search
  - Read
  - Print
  - Submit documents
  
- Cover sheet auto-populates with user's personal information

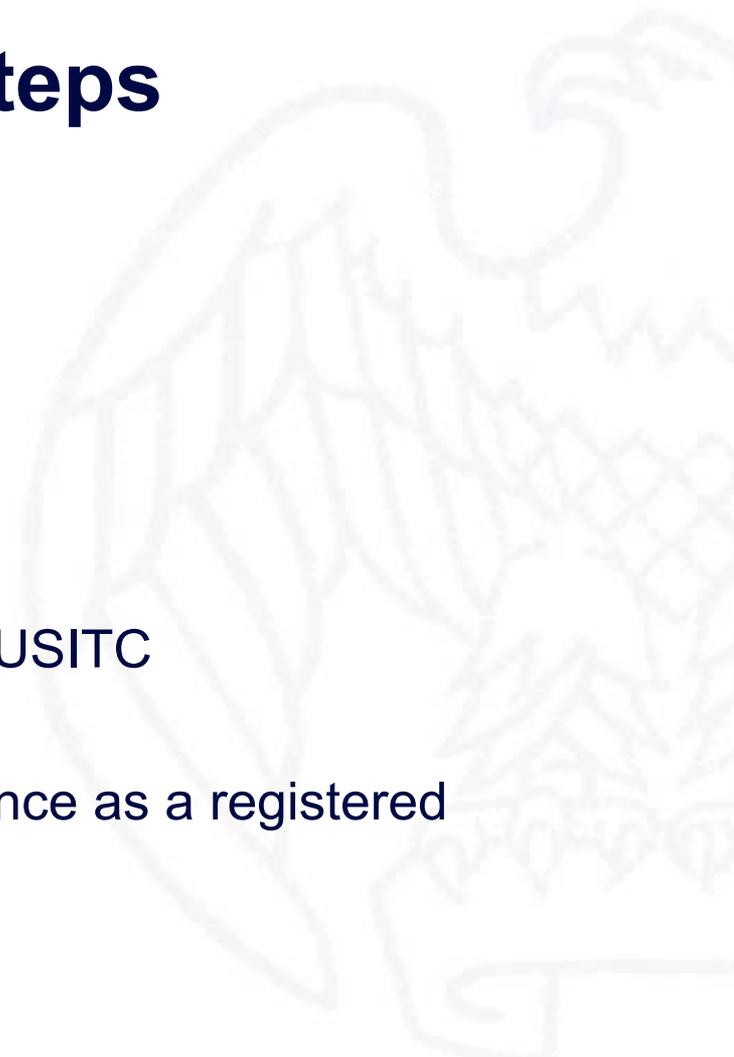
## ■ Public Users

- View Public Documents
  - Search
  - Read
  - Print
  - Submit documents
  
- Cover sheet must be manually populated with user's personal information for each submission



# Registration Steps

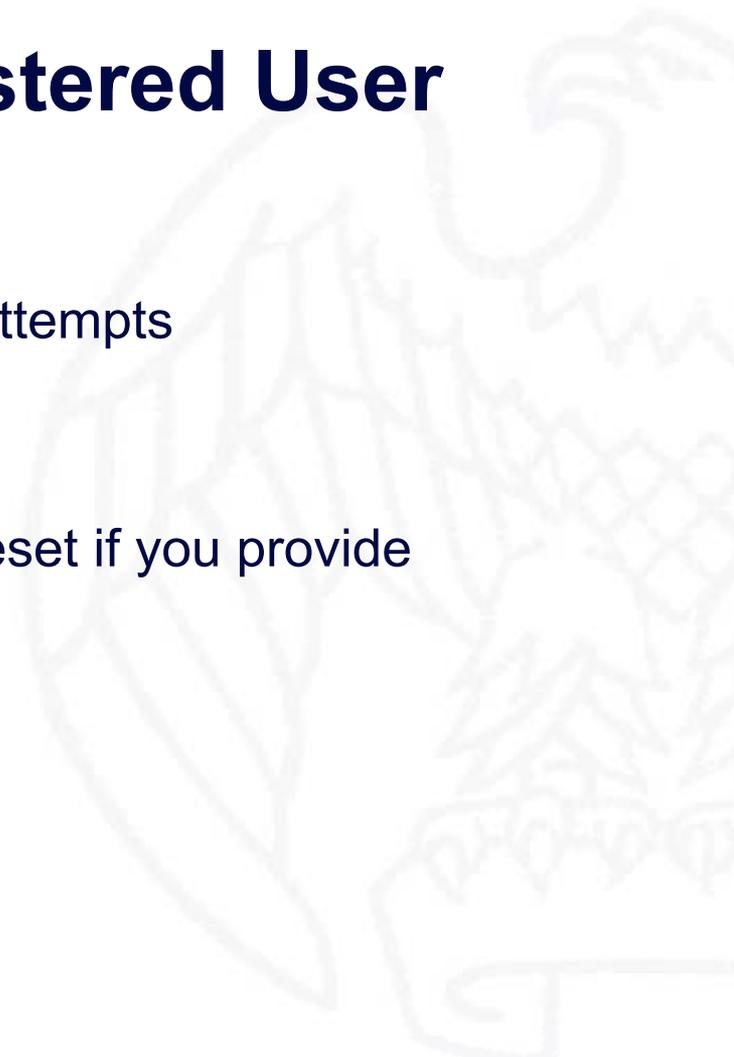
- Accept the Terms of Use agreement
- Complete a User Profile
- Complete User Login information
- Print, sign and mail registration form to USITC
- Receive e-mail notifying you of acceptance as a registered user





# Logging In as a Registered User

- You will be locked out after 3 attempts
- Forgotten passwords can be reset if you provide the proper code word





Presented to:  
The United States  
International Trade Commission

# Submitting Documents to USITC Using EDIS

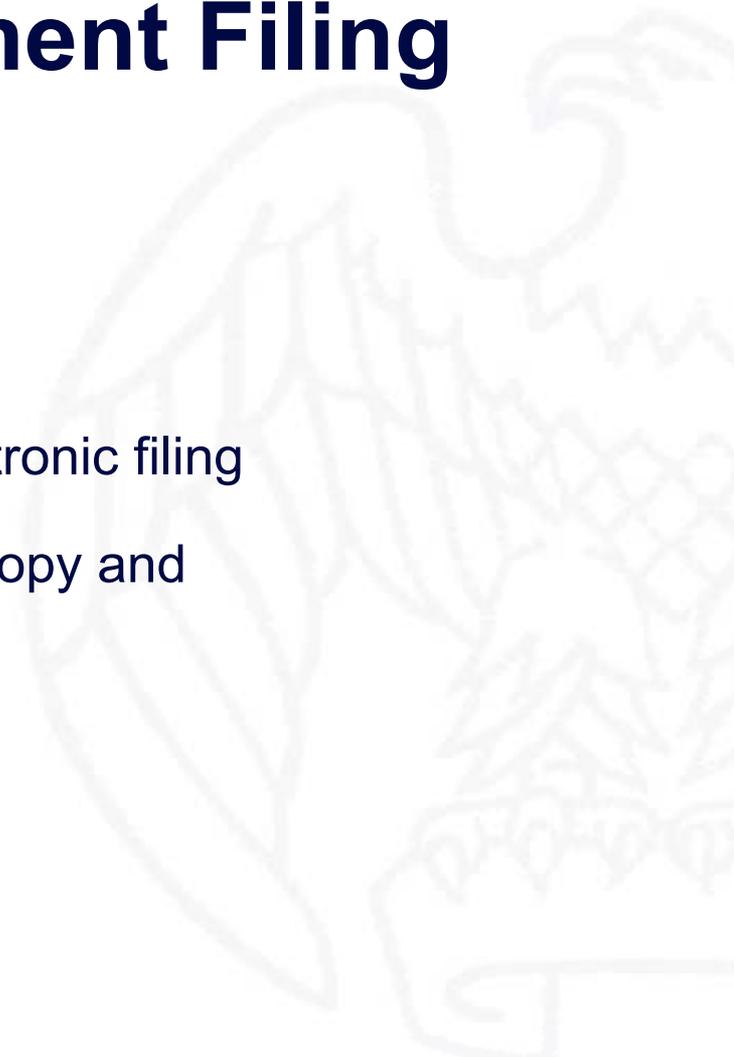




Presented to:  
The United States  
International Trade Commission

# Overview of Document Filing

- Hard copy filing rules
- Electronic filing rules
- Adding attachments to electronic filing
- Obtaining receipts of hard copy and electronic filing





# Hard Copy Filing

- Hard copy submittals must be accompanied by a cover sheet generated using EDIS
- The cover sheet needs the EDIS document number bar code. The font is available for download from the EDIS Create Cover Sheet page
- The system date and an official received date are automatically generated. The official received date is later changed to match the timestamp placed on filings received by the Dockets Branch of the Office of the Secretary
- Do not re-use cover sheets



# Electronic Filing

- Documents can be submitted from anywhere in the world at any time
- Reduced the burdens and costs (e.g., express mail, courier) associated with hard copy submissions
- Electronic documents submitted using EDIS must be in PDF format and meet the USITC PDF standards
- User can submit up to 10 attachments to a document at one time
- Electronic filings received after 5:15 p.m. EST will have the official received date set to the next business day, which will appear on the submitter's receipt



# USITC PDF Standards

- Must be valid PDF files of PDF version 1.3 or greater
- Must be no more than 5 MB in size
- Must have a PDF file security setting of “None”
- Must not contain any embedded files, JavaScript actions, or external cross references (web links and files)
- Must not contain any PDF comments (e.g., notes, files, sounds, etc.)
- Must not contain any form actions
- Must not contain any Type 3 Fonts or Unicode character sets



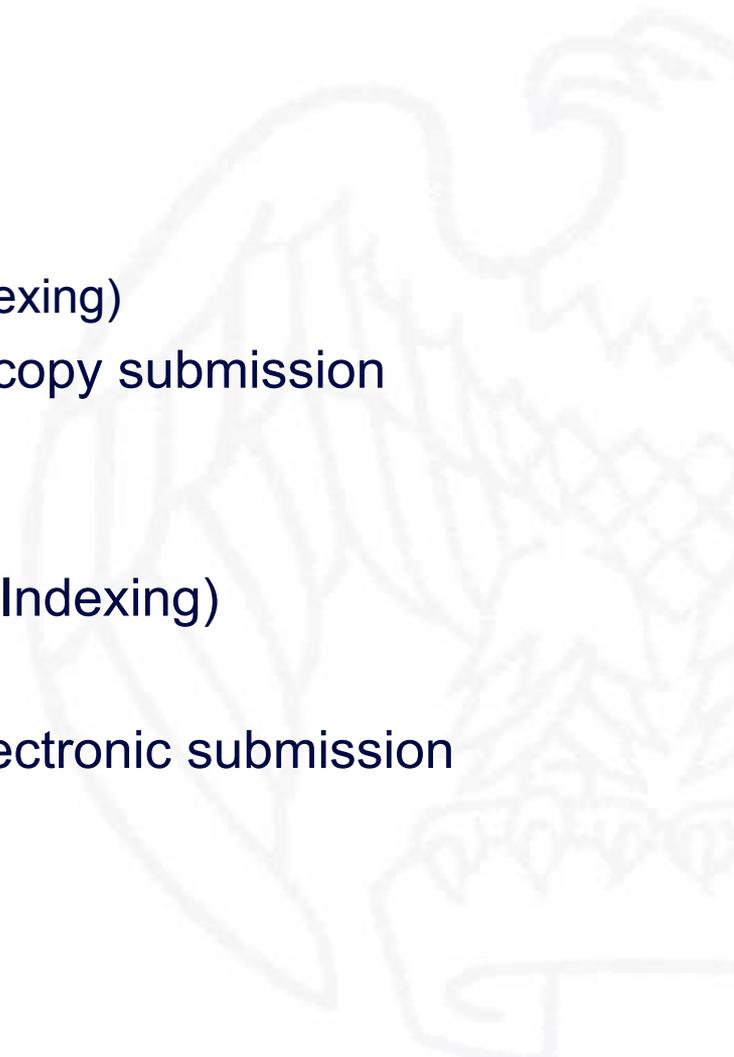
# Document Filing Features

- User information auto population
- Using the Investigation table
- Field checks before submission
- E-mail notification after submission and docket processing
- Sticky Indexing - ability to add additional documents without re-entering the document information



# DEMO

- Hard Copy Submission
  - Entering document information (Indexing)
  - Creating a cover sheet for hard copy submission
  
- Electronic Submission
  - Entering document information (Indexing)
  - Attaching documents
  - Creating a cover sheet for an electronic submission
  - Sticky indexing





# The Hitlist

- Documents meeting the search criteria are listed on a Hitlist  
EX: 5/2/2002 Hearing Material for ACE, Inc.
  
- Documents contain sections  
EX. Exhibits, Testimony
  
- Sections are opened to view the contents
  - Electronic version of the document
  - Text with full text or theme search results highlighted

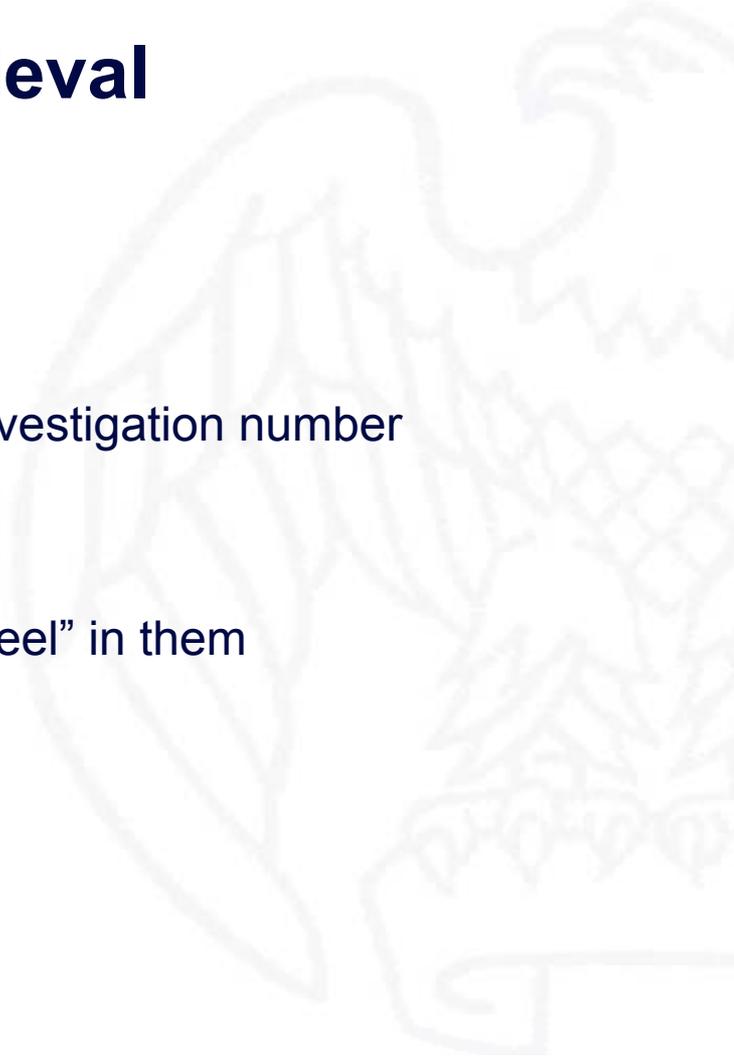




# Search and Retrieval

## Searches can be:

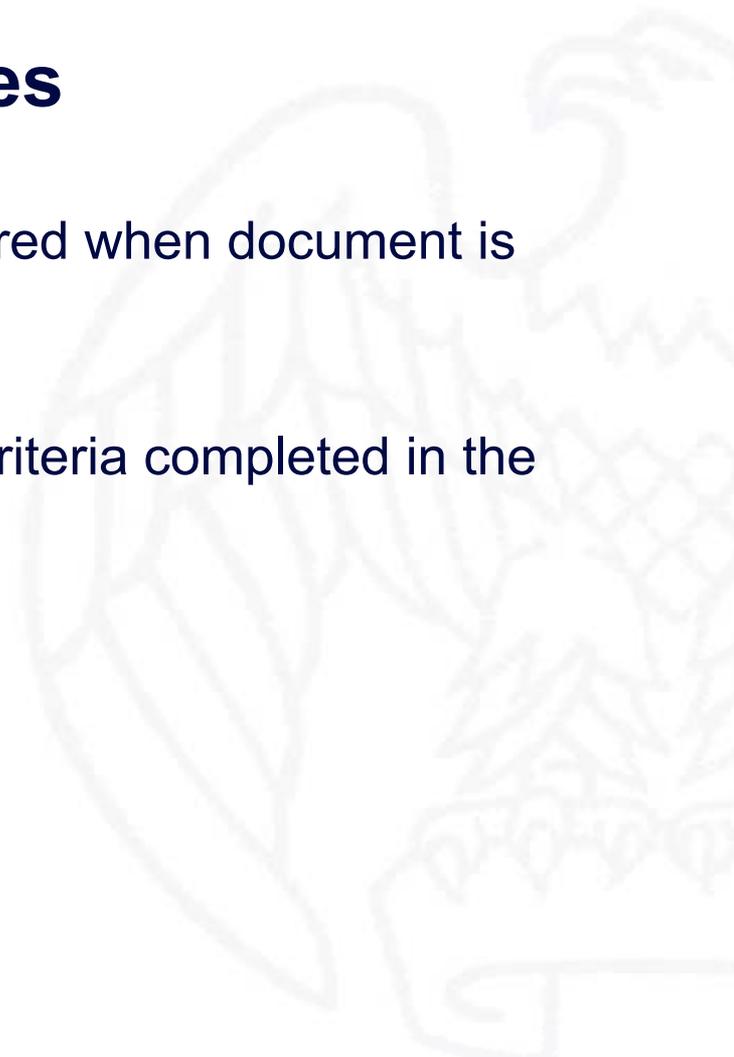
- Index
  - Show me all documents with a specific investigation number
- Text or Theme Based
  - Show me all documents with the word “steel” in them
- Advanced
  - Construct SQL statements  
*upper( filed\_by ) LIKE upper( '%oWEN' )*





## Index Searches

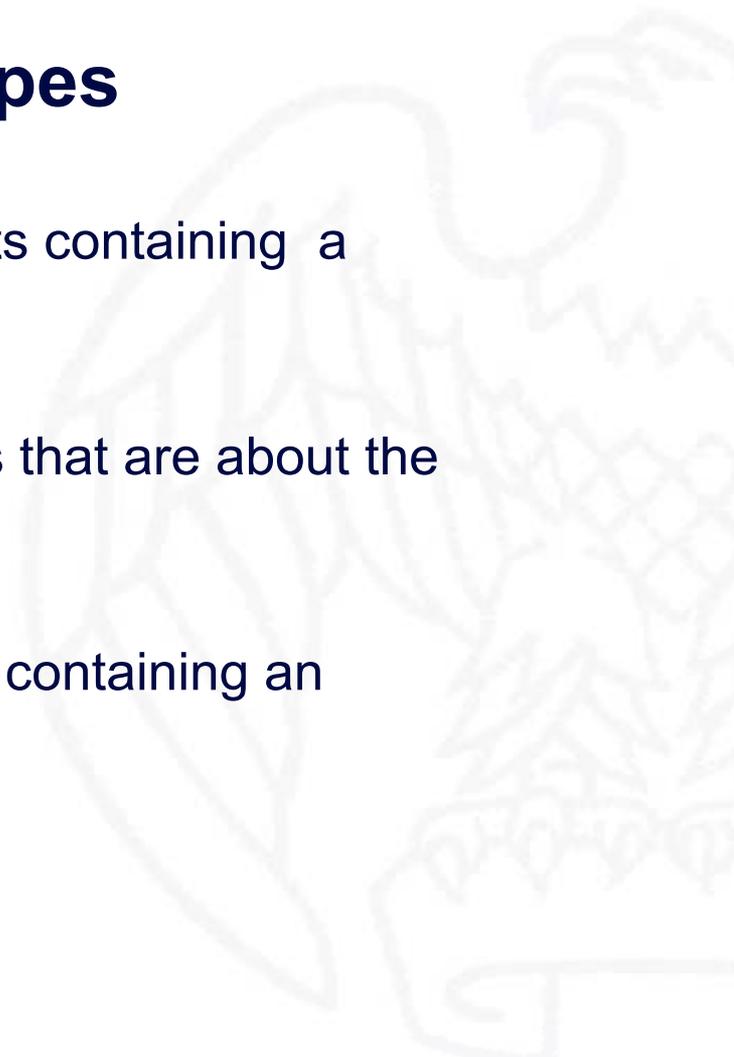
- Information from the cover sheet captured when document is entered into EDIS
- Search for documents that match the criteria completed in the Search/Retrieval form
- Wild card searching is permitted
- Can be combined with a text search





## Text Search Types

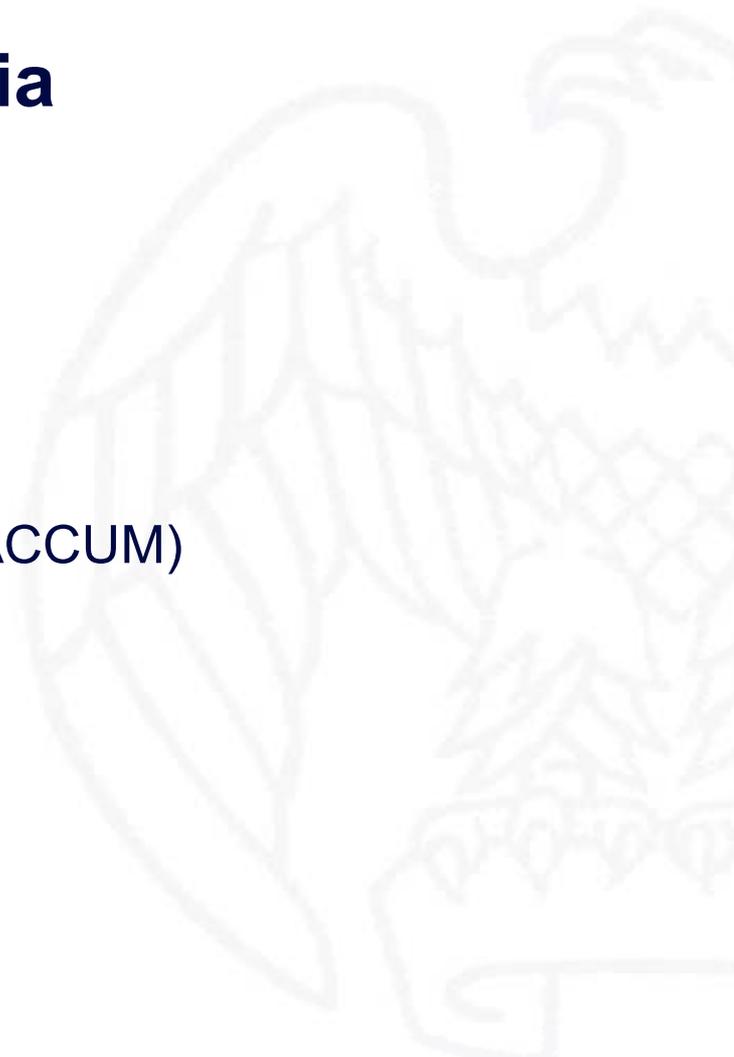
- Text Contains – search for documents containing a specified word
- Text is about – search for documents that are about the text provided
- Themes Are – search for documents containing an Oracle theme





## Search Criteria

- Match all terms (AND)
- Match any terms (OR)
- Match any terms with weighting (ACCUM)
- Match phrase





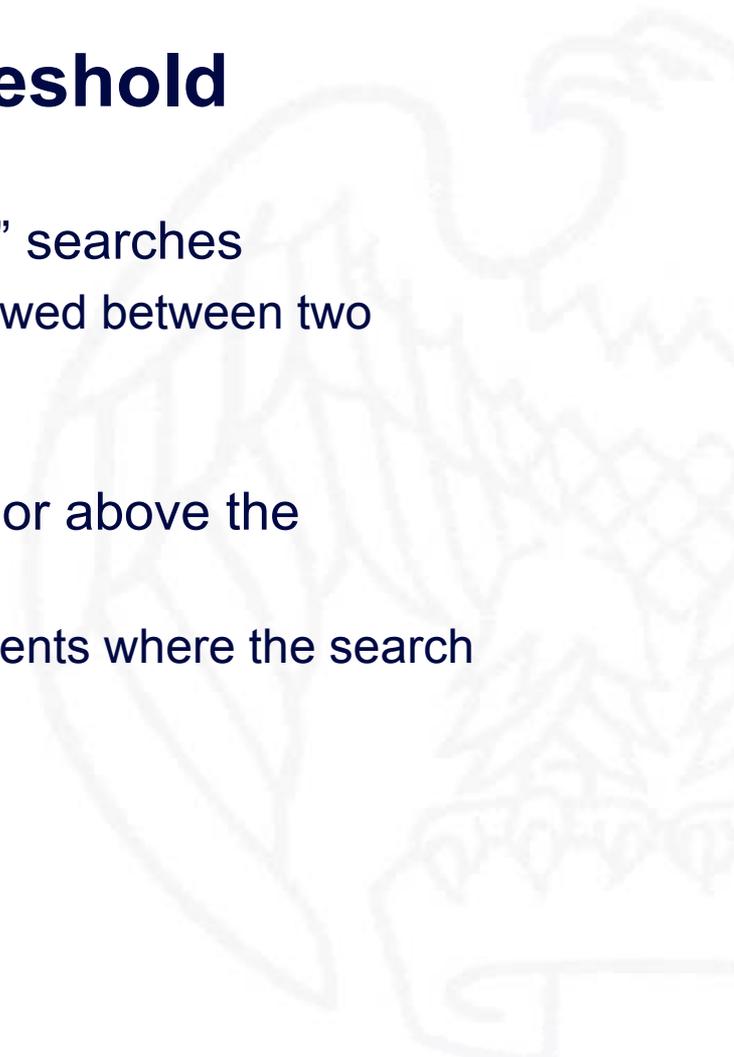
## Similarity Methods

- Stemming – includes words with same root
  - EX: quick would retrieve documents with quickly, quicker, quickest
- Fuzzy – includes words spelled similarly
  - EX: fox would retrieve documents with fox, fix and fax
- Soundex – includes words that sound like others
  - EX: Smith would retrieve documents that contain Smythe
- None – look for an exact match on word(s)



## Proximity and Threshold

- Proximity – available for “text contains” searches
  - Specifies the maximum # of words allowed between two search terms
- Threshold – documents must score at or above the threshold specified
  - Used to restrict results to those documents where the search criteria is more prevalent





## Wrap Up

- EDIS houses electronic images of documents pertaining to an investigation
- Documents are classified as public, confidential or privileged
- Data is indexed for easy retrieval
- Multiple methods are available to search for documents
- Documents can be viewed and printed



Presented to:  
The United States  
International Trade Commission

# Questions and Answers

